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Wealthtech Weekly

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By Rob Burgess
Reporter

Earlier this month at Future Proof in Huntington Beach, California, two industry leaders took to the stage to discuss how high-growth businesses take proactive steps to move beyond the "mediocre" culture that prevails at many middling firms. See what Brad Johnson of Triad Partners and Daniel Crosby of Orion recommended.

What makes your firm's culture special? Let me know — robert.burgess@arizent.com.

I hope you'll check out this article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

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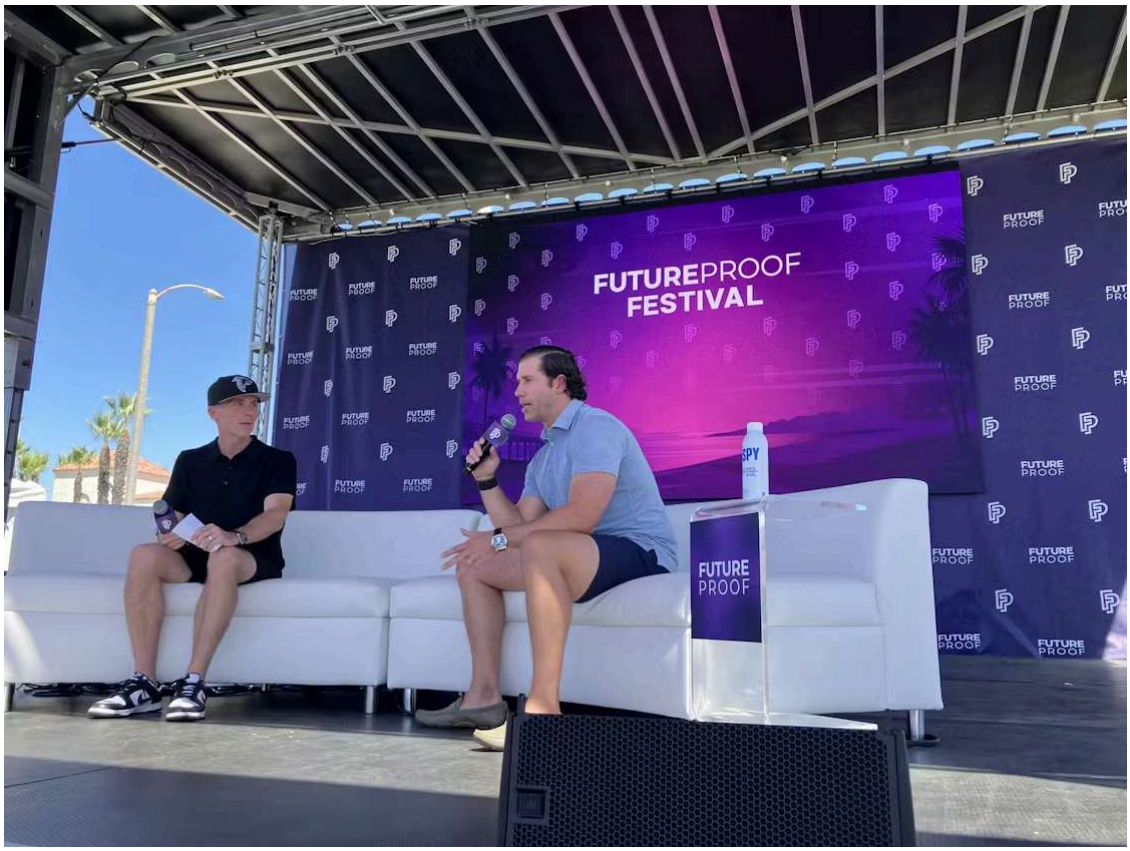
Why wealth firms shouldn't settle for 'mediocre' culture



Wealth management firms can purposefully create an atmosphere centered on growth — but it takes effort and intention, said Daniel Crosby of Orion and Brad Johnson of Triad Partners.

- **Why advisors are cautiously optimistic about Fed rate cut**
  Respondents in this month's Financial Advisor Confidence Outlook cheered the prospect of a Fed rate cut, but they didn't feel good about much else.

- **Where advisors are changing allocations as rate cuts pick up steam**
  Financial Planning's September Financial Advisor Confidence Outlook found that equities are growing hotter and cash is cooling off in client portfolios.
- **Collectible cards are hot, but are they good investments?**
  Even as Canadian investor and "Shark Tank" co-star Kevin O'Leary broke records last month with the $13 million basketball card he helped purchase, experts warn that there are pitfalls.
- **Strong social media policies shield wealth firms from potential fallout**
  After right-wing activist Charlie Kirk was killed, some workers found out the hard way that personal social posts had professional consequences. Experts say the time for firms to strengthen policies is now.

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